



KURDISTAN DEVELOPMENT MANAGEMENT SYSTEM (KDMS)

DONOR PROFILE APPLICATION USER MANUAL

Version 1.3

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1. INTRODUCTION

This document describes the *Donor Profile* application of the *Kurdistan Development Management System (KDMS)*. It provides the necessary instructions to follow during the data entry process. The document is addressed to those who will use the *KDMS* application to add or modify donor profile information.

2. OVERVIEW

The *Kurdistan Development Management System (KDMS)* is an automated information management system which is designed to improve efficiency and coordination of donor activities in Kurdistan. It is also a powerful tool for tracking and analyzing aid flows. The system serves as the main database and data collection and reporting system as it ensures effective access to aid data.

The main objectives of the *KDMS* is to serve as a reliable and credible source of information on overall donor contributions to Kurdistan's reconstruction, economic recovery and socio-economic development, as well as to support the Government in effectively managing development assistance and promoting the accountable and transparent use of resources.

In the following version of *KDMS*, the following applications are present:

- **External Assistance Projects**
- **Donor Profile**
- **Capital Investment Projects**
- **Kurdistan Development Projects**
- **Indicator**

The *Donor Profile* application in the *KDMS* is designed to track the information on donor organizations providing assistance to the country. Once you have accessed this application, you are able to view donor profile information and create analytical reports in the forms of Lists and Charts.

Moreover, the *Donor Profile* application contains a built-in on-line data entry subsystem, which is designed to allow managing the donors profile information filled in by the *KDMS* administrator remotely via Internet.

This *Donor Profile* application provides a web-based user interface and requires a web browser (Internet Explorer) pre-installed.

To ensure more flexibility and a more user-friendly environment, the *KDMS* has been implemented as a bi-lingual system allowing the users to view the data presented in the system in two languages: English and Kurdish.

3. DONOR PROFILE DATA ENTRY FORM

In the *Donor Profile* application (Figure 1 and Figure 2), you can provide key information about a donor organisation that acts as an originator of funds for the project. The information to be provided includes the donor organisation / agency name, points of contact within the agency, donor's funding policy, the pledges, etc.

The screenshot displays the 'DONOR PROFILE: WB' application window. It features three main sections for data entry:

- 1 - Mission / Vision:** Includes a language dropdown (ENG) and a text area containing the World Bank Group's mission statement.
- 2 - Donor Contributions:** Features a table for contributions with columns for Channel / Sector, Year, Funding Type, and Commitment. It shows a total commitment of 88,500,000 USD.
- 3 - Pledges:** Features a table for pledges with columns for Year / Sector, Event, Funding Type, and Amount. It shows a total pledge amount of 3,750,000 USD.

At the top right, there are links for 'Contact Us' and 'Help'. The bottom of the window has a decorative wavy border.

Channel / Sector	Year	Funding Type	Commitment
Bilateral			86,000,000
WB.ITF			2,500,000
HEALTH / Primary health care	2013	Grant	2,500,000
TOTAL			88,500,000

Year / Sector	Event	Funding Type	Amount
2013			3,750,000
HEALTH / Health Services	Non-conference related	Grant	3,750,000
TOTAL			3,750,000

Figure 1: Donor Profile Data Entry Form (Part 1)

The screenshot displays the 'Donor Profile Data Entry Form (Part 2)' with a wavy decorative header. It contains four main sections:

- 4 - Offices:** Includes a table with one entry: 'WB Interim Office in Amman' (marked with a red X). The address is 'T16 Ahmed Orabi Street, Shimeisani—Amman, Jordan', phone is '(962-6) 568-5060', and email is 'mziade@worldbank.org'. A radio button labeled 'Is Office Primary' is selected. Below the table is an 'Add/Edit Offices' button.
- 5 - Contacts:** Includes a table with one entry: 'Mona Ziade' (marked with a red X). The phone is '(961-1) 987 800' and email is 'mziade@worldbank.org'. A radio button labeled 'Is Contact Focal' is selected. Below the table is an 'Add/Edit Contacts' button.
- 6 - Funding Policy:** Features a text area with English text: 'poverty. The Bank promises technical assistance apart from loans and credits. It is mainly the non-governmental organizations, academic institutions, companies and individuals from member countries of the World Bank are entitled to fight for these business opportunities and World Bank funding sources.' Below this is a KUR (Kurdish) text area.
- 7 - Source of Funds:** Features a text area with English text: 'World Bank funding sources originate from a number of different options. The International Bank for Reconstruction and Development (IBRD), for instance, is one of the institutions of the World Bank and raises most of its funds by selling World Bank bonds to investors. This AAA-rated financial institution has shareholders as sovereign governments. Unlike the commercial banks, its members have a voice in setting the Bank's policies and the main objective is to promote'. Below this is a KUR text area.

At the bottom right, there are three buttons: 'Save', 'Save and Close', and 'Cancel'.

Figure 2: Donor Profile Data Entry Form (Part 2)

For more information on how to provide the information requested, refer to the table below:

Field Name	Instructions
Mission / Vision	Provide information about the donor organisation / agency mission and/or vision.
Donor Contributions	Provide financial information on the donor commitments. For details on managing donor contributions, see Managing Donor Contributions .

Pledges	Provide information about the pledges. For details on pledges management, see Managing Pledge Records .
Offices	Provide information about the different offices of the selected donor organisation / agency. For details on office records management, see Managing Office Records .
Contacts	Indicated the contacts for the donor organization / agency. They will be contacted with questions, suggestion, and/or comments. For details on contacts management, see Managing Contacts .
Funding Policy	Describe the funding policy of the donor organization / agency.
Source of Funds	Provide information about the source of funds of the donor organization / agency.

3.1 Managing Donor Contributions

This chapter outlines how to add, edit and remove donor contribution records.

3.1.1 Adding a Contribution Record

In order to add a commitment record, follow the steps below:

1. Click the **Add Commitment** button at the bottom of the field. You will be directed to the *Donor Contributions* form (Figure 3).
2. Provide the information requested in the form.

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Year	The year when the commitment is made. <i>This field is mandatory.</i>
Channel	The channel to which the commitment was made. <i>This field is mandatory.</i>
Sector	The sector of economy the financial means are intended for. <i>This field is mandatory.</i>
Sub-Sector	The sub-sector of economy the financial means are intended for. Please note that once you have selected the appropriate sector, the list of sub-sectors pertaining to the selected sector will appear in the Sub-Sector field.
Currency	The currency in which the commitment was made. <i>This field is mandatory.</i>
Amount	The commitment amount. The selected foreign currency's rate towards

	USD will be displayed automatically. <i>This field is mandatory.</i>
Funding Type	The type of the funding. <i>This field is mandatory.</i>
Comments	Provide optional comments both in English and Kurdish, if needed.

3. Click the **OK** button to confirm the information input. Or, **Cancel** to terminate the operation.

Add / Edit Contribution * - Required Field

Year * 2013

Channel * WB.ITF

Sector * HEALTH

Sub-Sector Primary health care

Currency * USD (US Dollar)

Amount * 2,500,000

Funding Type * Grant

Comments

ENG
The contribution will be used to develop and implement a master plan for reconstruction of the health care delivery system

KUR

Add Another Contribution OK Cancel

Figure 3: Adding a Donor Contribution Record

In order to add another commitment, please click the **Add Another Contribution** button and provide the information requested as described in the paragraphs above.

3.1.2 Editing Contribution Records

In order to edit an existing record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to confirm the changes made. Or, **Cancel** to terminate the operation.

3.1.3 Removing Contribution Records

In order to remove an existing record, click **✖ (Remove from the list)** to the left of the selected record.

3.2 Managing Pledge Records

This chapter outlines how to add, edit and remove pledge records.

3.2.1 Adding a Pledge Record

In order to add a new pledge record, follow the steps below:

1. Click the respective **Add Pledge** button at the bottom of the field. You will be directed to the **Pledges** sub-section (Figure 4).
2. Provide the information requested in the form.

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Year	The year when the pledge is made. <i>This field is mandatory.</i>
Event	Select the event during which the pledge was made. <i>This field is mandatory.</i>
Sector	The sector of economy the financial means are intended for. <i>This field is mandatory.</i>
Sub-Sector	The sub-sector of economy the financial means are intended for. Please note that once you have selected the appropriate sector, the list of sub-sectors pertaining to the selected sector will appear in the Sub-Sector field.
Currency	The currency in which the pledge was made. <i>This field is mandatory.</i>
Amount	The pledge amount. The selected foreign currency's rate towards USD will be displayed automatically. <i>This field is mandatory.</i>
Funding Type	The type of the funding. <i>This field is mandatory.</i>

Comments	Provide optional comments both in English and Kurdish, if needed.
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- Click the **OK** button to confirm the information input. Or, **Cancel** to terminate the operation.

Pledges * - Required Field

Year * 2013

Event * Non-conference related

Sector * HEALTH

Sub-Sector Health Services

Currency * USD (US Dollar)

Amount * 3,750,000

Funding Type * Grant

Comments

ENG
The Wold Banks aims at developing public-private partnerships in the provision of health services.

KUR

OK Cancel

Figure 4: Adding a New Pledge Record

3.2.2 Editing Pledge Records

In order to edit an existing pledge record, follow the steps below:

- Click the pledge record that needs to be modified. This will activate the selected record.
- Make the appropriate changes in the data displayed.
- Click the **OK** button to confirm the changes made. Or, **Cancel** to terminate the operation.

3.2.3 Removing Pledge Records

In order to remove an existing pledge record, should click **✖ (Remove from the list)** to the left of the selected record.

3.3 Managing Office Records

This chapter outlines how to add, edit and remove office records.

3.3.1 Adding an Office Record

In order to add a new office record, follow the steps below:

1. Click the **Add/Edit Offices** button at the bottom of the field. You will be directed to the **Add/Edit Offices** sub-section (Figure 5).
2. Specify the **Office Name** both in English and Kurdish in the respective fields.
3. Provide the postal address for the office both in English and Kurdish in the **Address** field.
4. Indicate the **Phone Number** of the office in the respective field.
5. Specify the e-mail address of the office in the **E-mail** field.
6. Click the **OK** button to confirm the information input. Or, **Cancel** to terminate the operation.

The screenshot shows a web application window titled "Add/Edit Offices > WB". In the top right corner, there is a legend: "* - Required Field". The form contains four main sections, each with a label on the left and input fields on the right:

- Office Name ***: Two input fields. The first is labeled "ENG" and contains "Washington Office". The second is labeled "KUR" and is empty.
- Address**: Two input fields. The first is labeled "ENG" and contains "1818 H Street NW, Washington, DC 20433 USA". The second is labeled "KUR" and is empty.
- Mobile**: One input field containing "+1 202-473-9887".
- E-mail ***: One input field containing "Isaade@worldbank.org".

At the bottom of the form, there are three buttons: "Add Another Office" on the left, and "OK" and "Cancel" on the right.

Figure 5: Adding a New Office Record

In order to add another office record, please click the **Add Another Office** button and provide the information requested as described in the paragraphs above.

3.3.2 Editing Office Records

In order to edit an existing office record, follow the steps below:

1. Click the donor organization office record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to confirm the changes made. Or, **Cancel** to terminate the operation.

3.3.3 Removing Office Records

In order to remove an existing office record, click **✖ (Remove from the list)** to the left of the selected record.

3.4 Managing Contacts

This chapter outlines how to add, edit and remove contacts.

3.4.1 Adding a Contact

In order to add a donor organisation contact record, follow the steps below:

1. Click the **Add/Edit Contacts** button at the bottom of the field. You will be directed to the *Add/Edit Contacts* form (Figure 6). The list of all existing contacts within the donor organisation will be displayed.
2. Locate the appropriate contact(s) in the list displayed.

Note: To make it easier to locate the appropriate contact in the long list, the system has a search capability. To find the relevant contact, enter the search criteria in the respective field and define what field to look in. Then click the **GO** button. The search results will return the contacts matching the criteria.

3. Add the selected contact(s) by ticking the check-box to the left of the contact name and clicking the **Add Selected** button. The selected contact(s) will appear in the *Selected Contacts* table.

Note: If the desired contact does not exist, you can create a new contact record. For details, see [Creating a New Contact](#).

4. In the [DONOR PROFILE DATA ENTRY FORM](#) specify which contact serves as the focal point for the donor organisation by activating the respective radio button.

Add/Edit Contacts > WB

Use the look-up controls below to search for all the contacts relevant to the organisation. Check each contact you would like to add for the organisation and click on "Add Selected" button.

Search for: in **All Fields**

3 items found

Contact	Organisation	Position	E-mail	Phone
<input type="checkbox"/> Faris Hadad-Zervos	WB	WB Representative	Fhadadzervose@worldbank.org	(962-6) 568-5060
<input type="checkbox"/> Lara Saade	WB	Communications Officer	LSaade@worldbank.org	(202) 473-1000
<input type="checkbox"/> Mona Ziade	WB	Communications Officer	mziade@worldbank.org	(961-1) 987 800

or [Create New](#)

Selected Contacts	Position	E-mail	Phone
<input checked="" type="checkbox"/> Lara Saade	Communications Officer	LSaade@worldbank.org	(202) 473-1000
<input checked="" type="checkbox"/> Mona Ziade	Communications Officer	mziade@worldbank.org	(961-1) 987 800

Figure 6: Contacts sub-section

If you wish to remove the contact from the selected list, click **X (Remove from the list)** button to the left of the selected contact record.

3.4.2 Creating a New Contact

In order to add a new contact, follow the steps below:

1. Click the **Create New** link at the bottom of the *Contacts* table. A new window will appear (Figure 7).
2. Select the donor organisation **Office** the contact works in from the drop-down list. Please note that the list will contain all instances added in the *Offices* section (see [Adding an Office Record](#)).
3. Fill in the contact's **First Name** and **Last Name** in the respective fields. *These fields are mandatory.*
4. Indicate the **Position** the contact occupies in the English and Kurdish languages.
5. Specify the contact's **E-mail** address in the appropriate field. *This field is mandatory.*
6. Indicate the contact's **Phone Numbers** (mobile, business, and home) and **Fax** number in the respective fields. *The Business phone number is mandatory.*
7. Provide the contact's address in the **Address** field. *This field is mandatory.*
8. Click the **OK** button to confirm the information input. Or, **Cancel** to terminate the operation.

Add/Edit Contact > WB * - Required Field

Office	Washington Office
First Name *	Lara
Last Name *	Saade
Position	ENG Communications Officer KUR
E-mail *	LSaade@worldbank.org
Phone Numbers	Mobile Business * (202) 473-1000 Home
Fax	(202) 477-6391
Address *	1818 H Street, NW Washington, DC 20433 USA

OK Cancel

Figure 7: Adding a New Contact Record

3.4.3 Editing Contact Records

In order to edit an existing donor organisation contact record, follow the steps below:

1. Click the contact record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to confirm the changes made. Or, **Cancel** to terminate the operation.

3.4.4 Removing Contact Records

In order to remove an existing donor organisation contact record, should click **✖ (Remove from the list)** to the left of the selected record.

4. SAVING DATA

When you have finished with data input or modification you should save your changes before you leave the page. Following options for saving the data are available both on the top and on the bottom of the page:

- **Save** - to save the data entered and to remain on the opened page.
Note: In sub-sections, clicking the **OK** button will save the changes made and to navigate you to the previous screen.
- **Save and Close** - to save the information input and leave the opened page.

If you wish to cancel your changes, use the **Cancel** button.

5. REFERENCES

Please refer to the following *KDMS* related documents:

- KDMS External Assistance Projects Application User Manual
- KDMS Capital Investment Projects Application User Manual
- KDMS Indicator Application User Manual
- KDMS Analytics User Manual
- KDMS Administration Center User Manual